



MEDIA TRENDS REPORT

NATIONAL EDITION | APRIL 2015

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DASHBOARD INSIGHTS BROUGHT TO LIFE

BRINGING YOU INSIGHTS FROM OUR LIBRARY OF SPOTFIRE DASHBOARDS

These days, video content is everywhere. And it's being consumed more than ever. With new viewing trends emerging, it's critical to understand what our measurement data is telling us.

From network ratings to device ownership, this report contains powerful insights into how media consumption is changing. In an effort to keep you informed of national trends, we have summarized key findings from our library of Media Trends dashboards, giving you a proactive overview of audience shifts.

The analyses contained in this report are only a small slice of what's available on our site. Customized views are ready for sharing, requiring only a few clicks. We hope this guide will empower you to educate curious clients while keeping you versed on trends.

The Media Trends Team

A LOOK AT YEAR OVER YEAR BROADCAST NETWORK PERFORMANCE

**% CHANGE IN RATINGS
COMPARED TO PRIOR MARCH MONTHS
PERSONS 25-54 | MSu Prime**

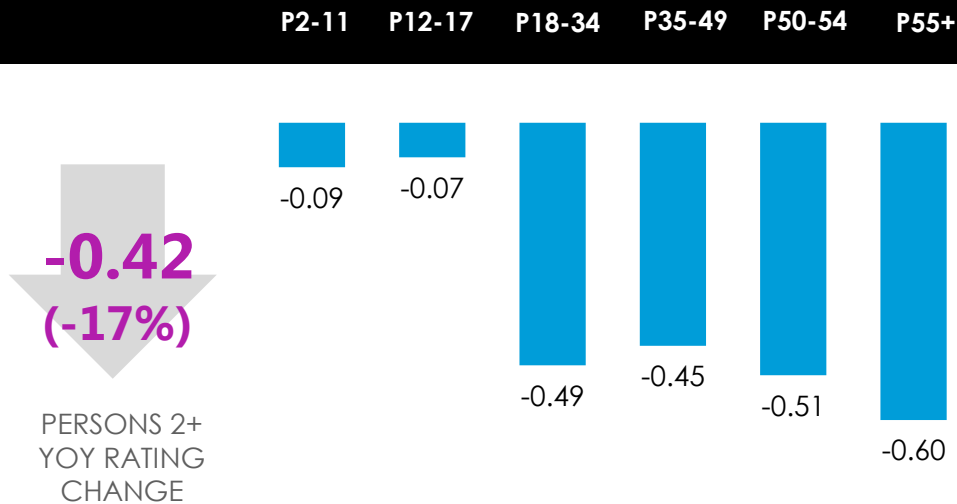
	VS. 2014	VS. 2013
ABC	-20%	-10%
CBS	-10%	-18%
FOX	+12%	-24%
NBC	-8%	+24%
CW	-13%	-2%
UNI	+6%	-18%
TEL	+19%	+6%

Three of the Big Four broadcast networks saw declines this March compared to last, with ABC seeing the largest percentage drop in Primetime viewing, followed by CBS. FOX had double-digit growth to their network (up 12%). Univision and Telemundo also saw increases over last March.



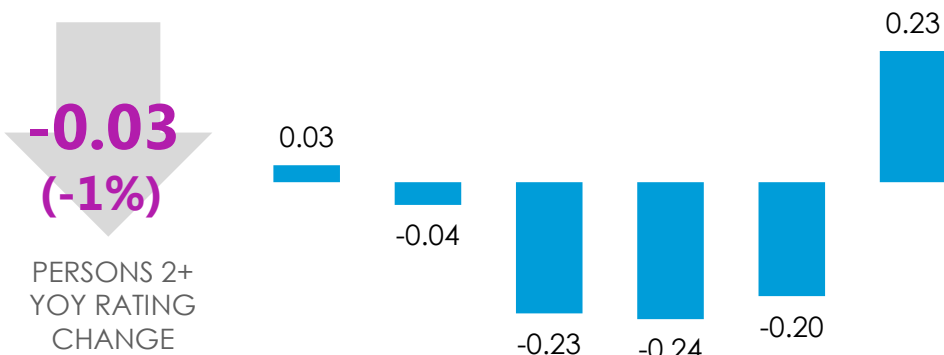
NETWORK PERFORMANCE ACROSS AGE SEGMENTS

ABC NETWORK



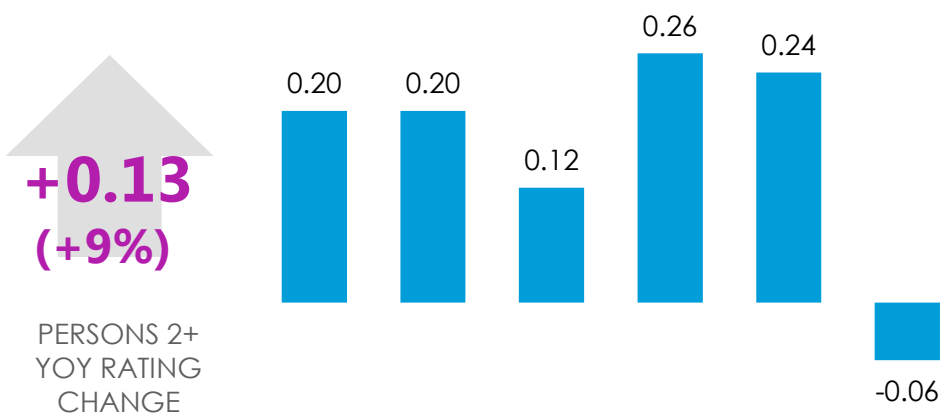
ABC's 17% decrease among P2+ was driven by all demographic segments making up Persons 18+

CBS NETWORK



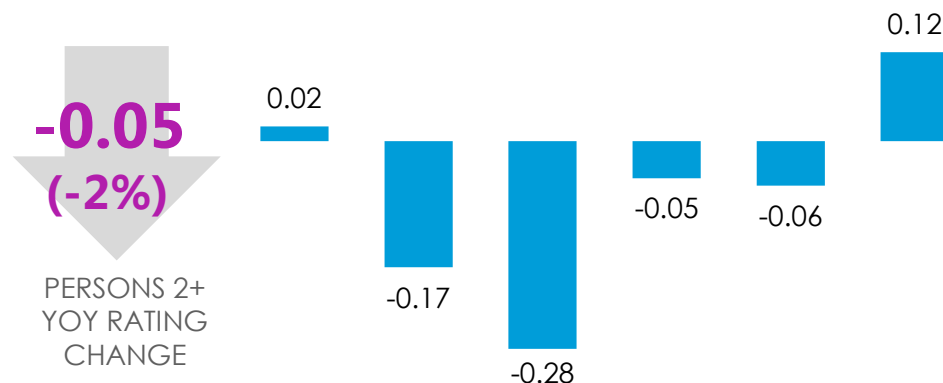
For CBS, overall Persons 2+ performance was in line with prior year, despite decreases among the 18-54 segments

FOX NETWORK



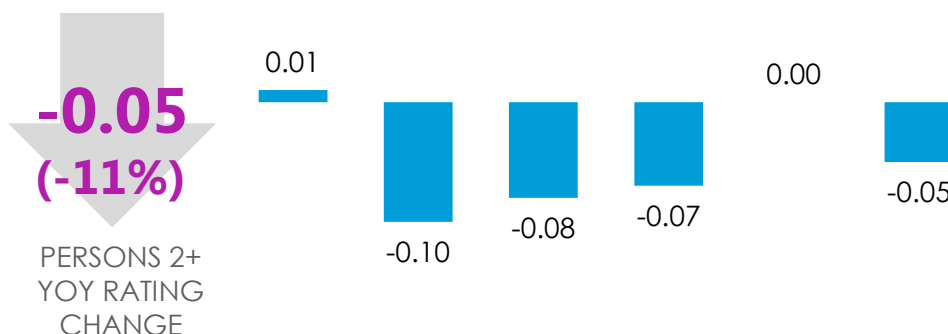
FOX saw increases across all demo segments except for P55+, with the largest gain among Persons 35-49

NBC NETWORK



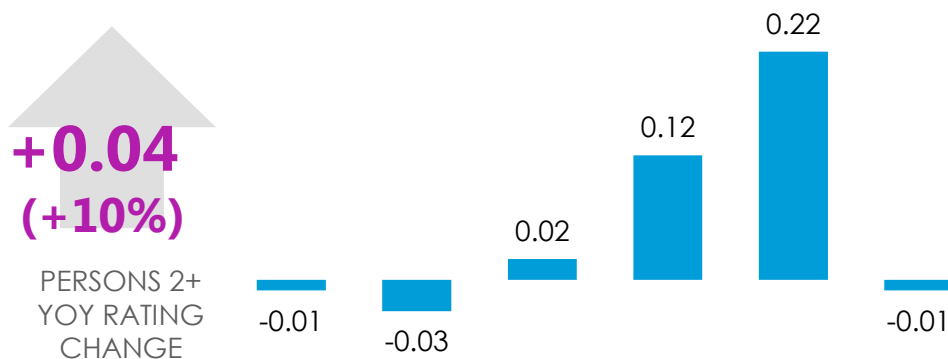
NBC was relatively stable this March compared to last, despite losses within most segments

CW NETWORK



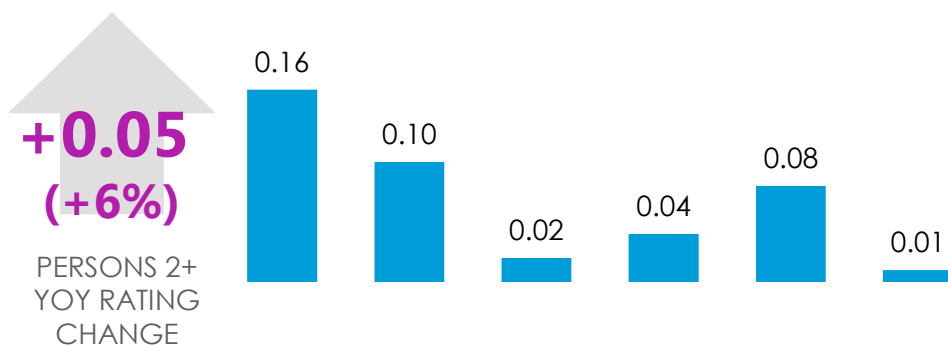
CW P2+ ratings fell 11%, driven mostly by Teens (-28%)

TELEMUNDO



Telemundo's growth was driven mostly by the P50-54 and P35-49 segments, which were up 58% and 25% respectively

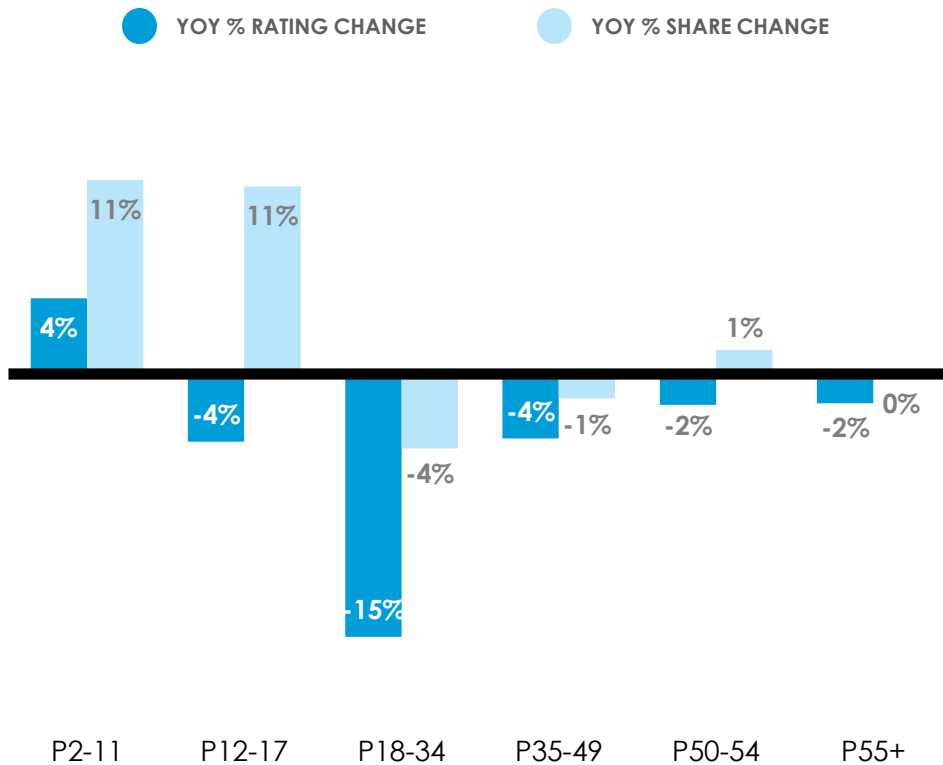
UNIVISION



Univision saw gains across all segments, with most notable increases among Children and Teens

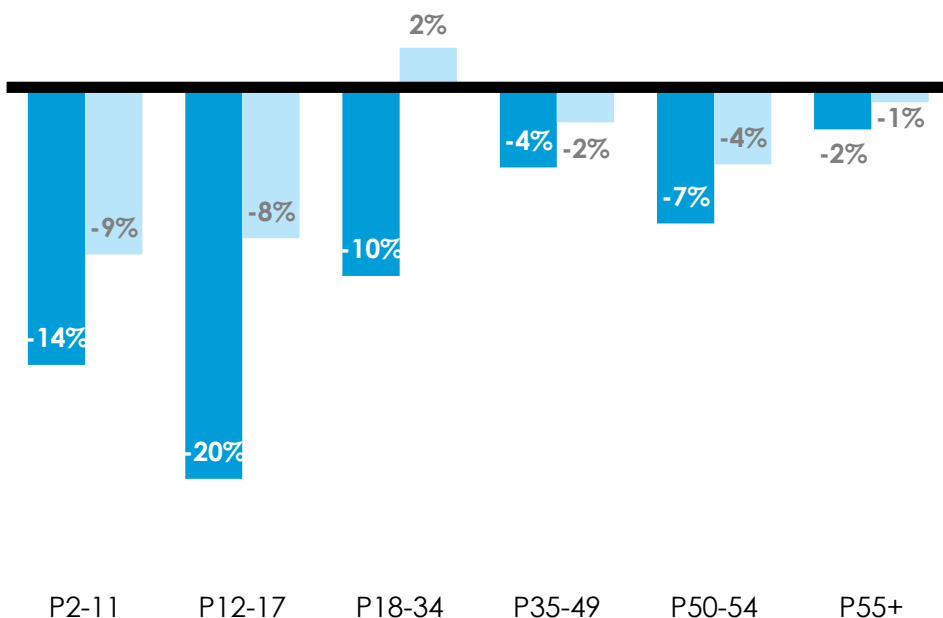
CABLE EXPERIENCED HIGHER LOSSES THAN BROADCAST THIS MARCH ACROSS THE KEY DEMOGRAPHICS

BROADCAST



Among Persons 2+, Broadcast Primetime ratings were down 3% this March, driven mostly by Persons 18-34; Children and Teens saw double-digit share increases to Broadcast

CABLE



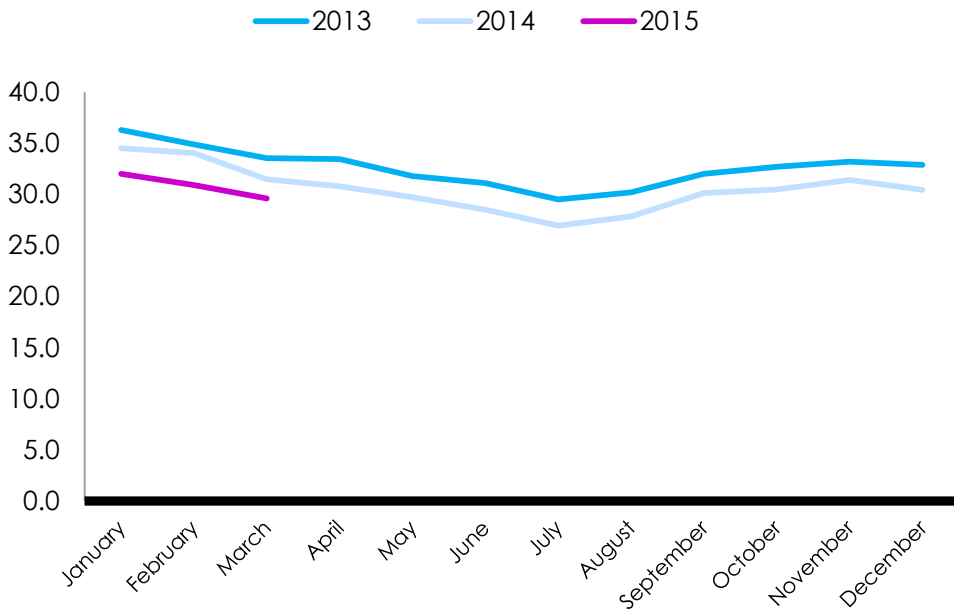
Primetime viewing to Ad-Supported Cable fell 6% this March, with most notable declines among Children and Teens; Despite a 10% ratings drop among P18-34, share increased 2%

THE DOWNWARD TREND OF LIVE VIEWING CONTINUES



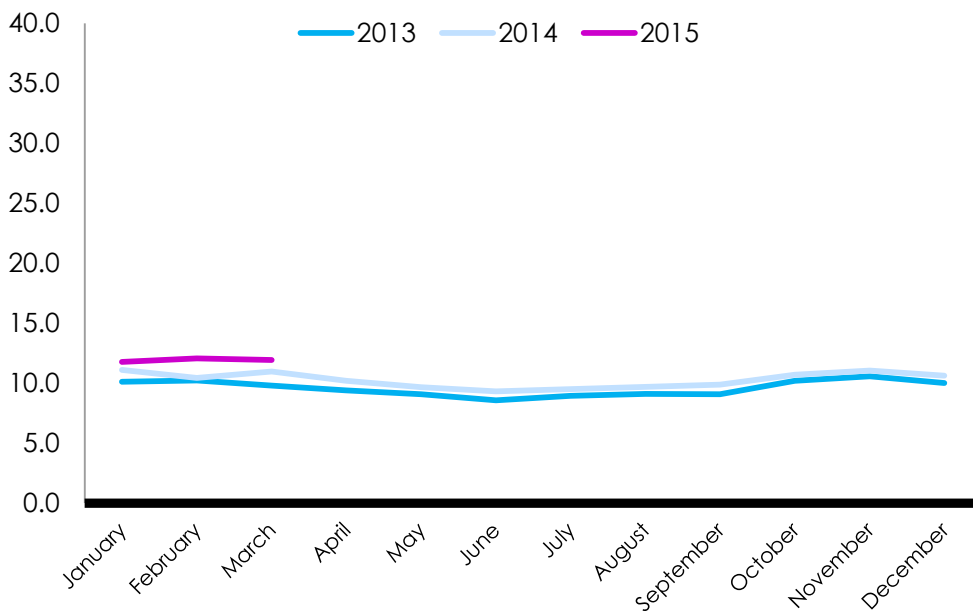
MONTHLY TV USAGE | PRIMETIME AMONG P25-54

Live TV Usage



Live TV usage is 6% lower this March compared to last year among Persons 25-54; When factoring in time-shifted viewing, the PUT decline reduces to 5%

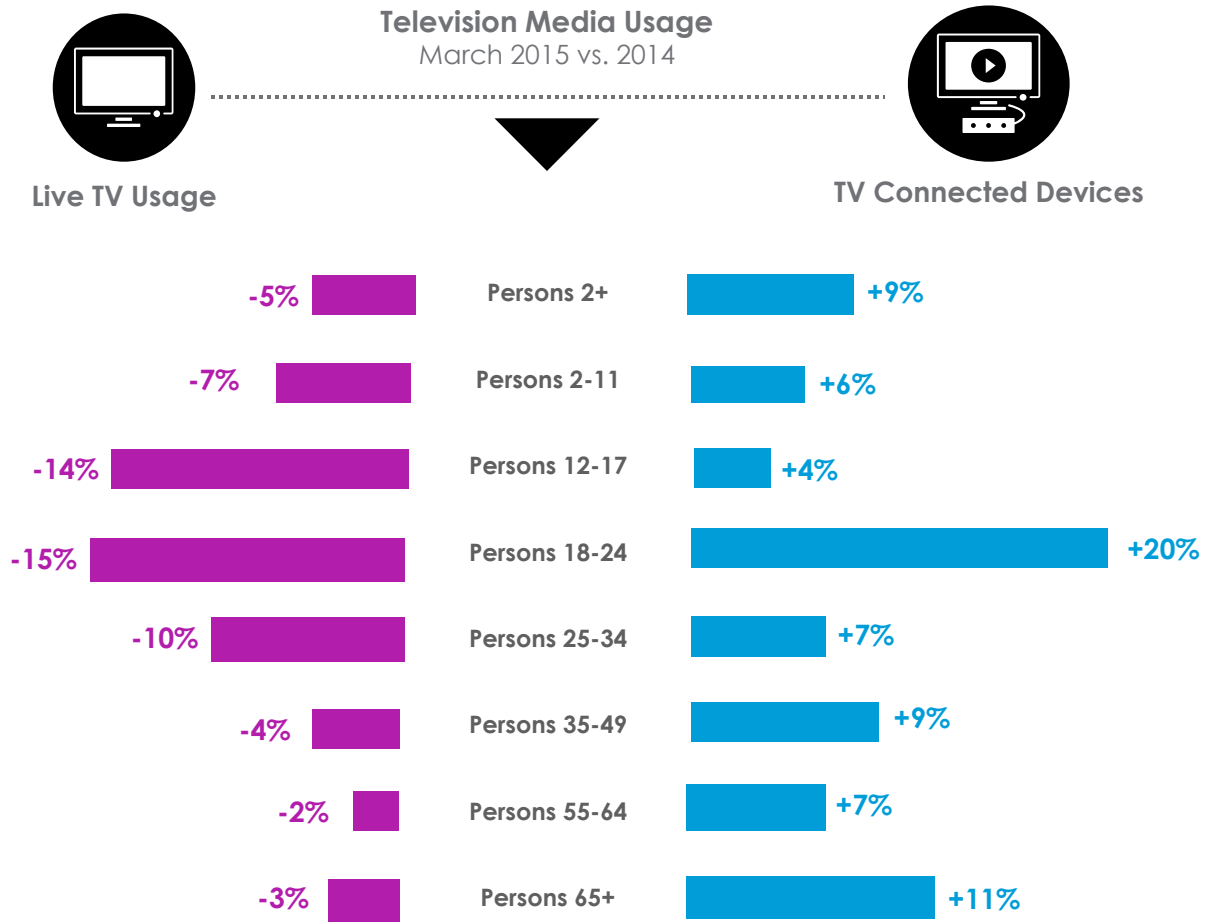
TV Connected Devices



Non-Traditional TV usage is up 9% this February versus last, driven mostly by an increase in Multimedia Devices (up 73%, from 1.0 to 1.8 rating points)

NON-TRADITIONAL MEDIA CONSUMPTION ON THE TV SCREEN IS GROWING ACROSS AGE SEGMENTS

YOY TV USAGE BY DEMOGRAPHIC



DEVICE USAGE IS GAINING MOMENTUM AMONG OLDER AGE GROUPS



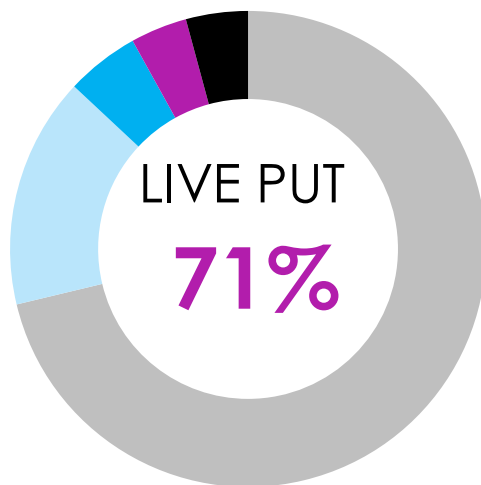
DVR Usage comprises 77% of total device usage among Persons 65+, while only accounting for 24% among Persons 18-34

DEVICE USAGE ACCOUNTS FOR OVER A QUARTER OF MEDIA CONSUMPTION ON THE TV SCREEN DURING PRIMETIME

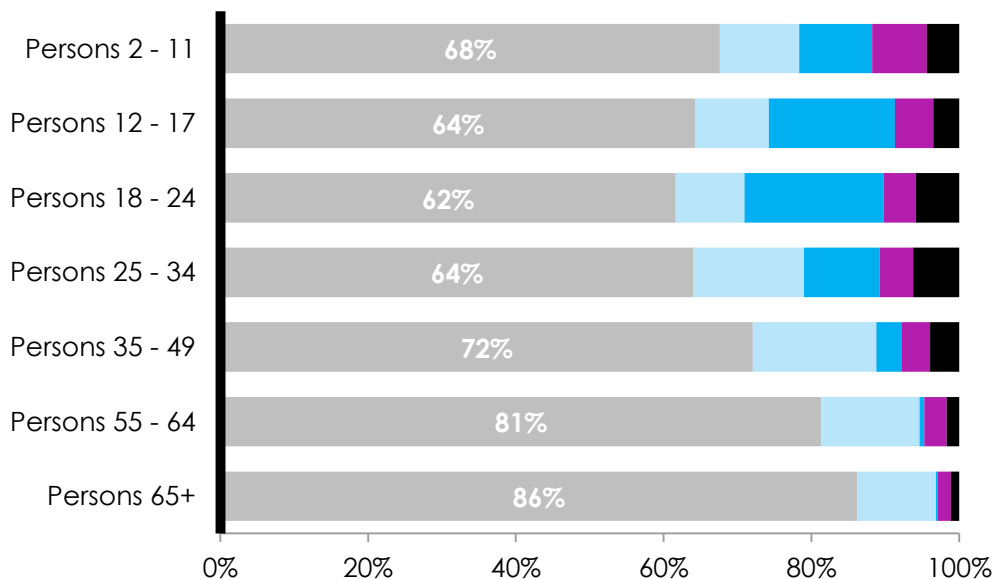
DISTRIBUTION OF TOTAL TV USAGE

Primetime | March 2015 | Persons 25-54

■ Live PUT ■ DVR Playback ■ Video Games ■ DVD/Blu-Ray ■ Multimedia Devices



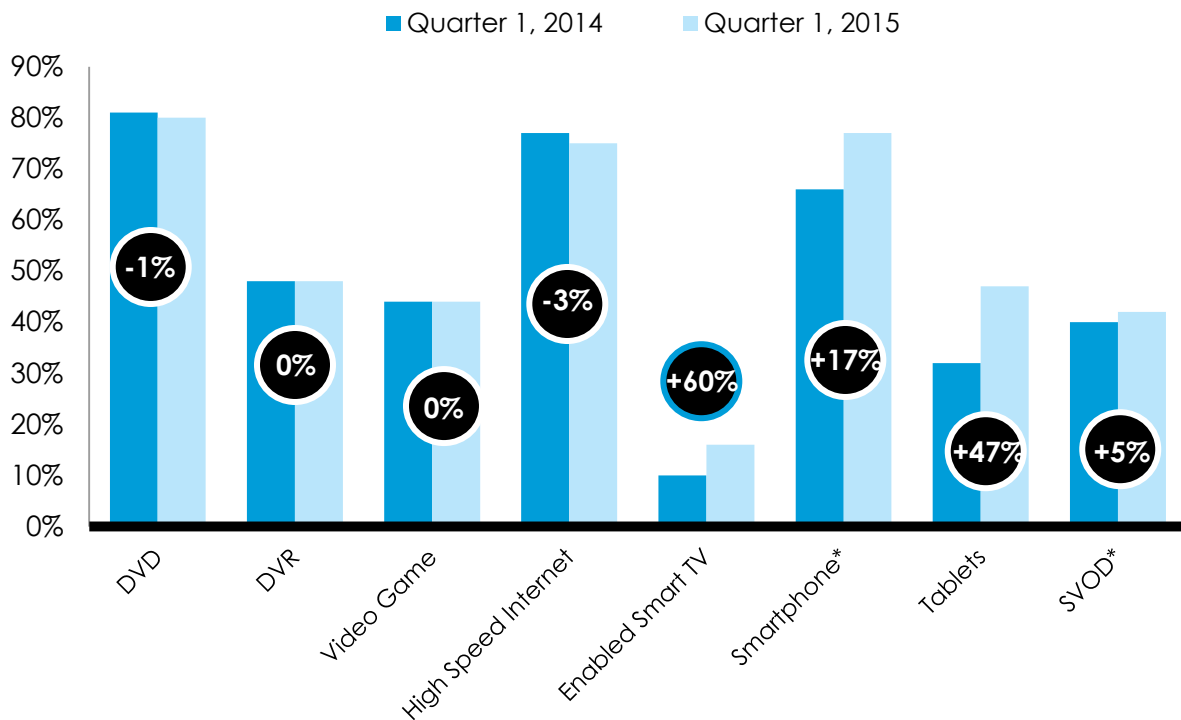
TUT Distribution by Age Group
March 2015 | M-Su Prime



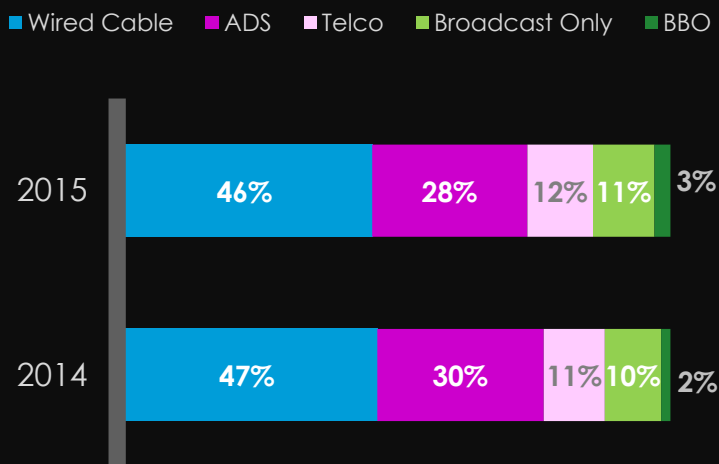
Primetime based on M-Sat 8-11PM, Sun 7-11PM, Live +SD
Total Usage includes Traditional TV (Live), and viewing to TV Devices (DVR, DVD, Multimedia Devices and Video Games)

TECHNOLOGY SHIFTS IN THE MARKETPLACE

YEAR OVER YEAR PENETRATION DIFFERENCES



DISTRIBUTION OF TV SERVICE PROVIDERS | MARCH 2015 | TOTAL HOUSEHOLDS



Wired Cable and ADS fell a combined 3% versus last March, while Telco, Broadcast Only and Broadband Only services increased (each gaining one percentage point, respectively)

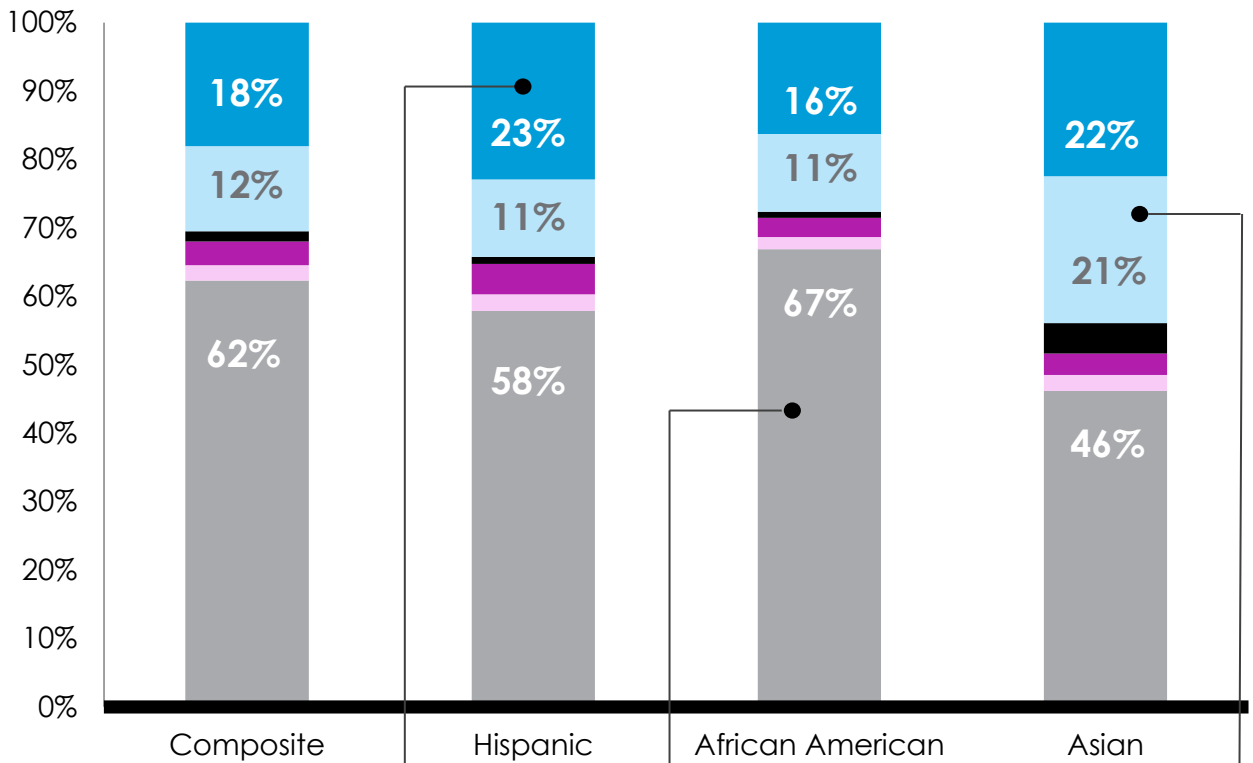
Hispanics show a higher preference for Broadcast Only (17%), and ADS (37%) compared to the Total Sample, while African Americans are more aligned

TV Service Provider data based on March among Households
 *Smartphone figures based on Persons 18+ for Quarter 4, 2014 vs 2013; All other breaks based on Households (Scaled Installed Counts)
 SVOD based on September 2014 vs. February 2015

DIFFERENCES IN MEDIA CONSUMPTION EMERGE WHEN COMPARING TOTAL TIME SPENT ACROSS ETHNICITIES

DISTRIBUTION OF MONTHLY TIME SPENT | QUARTER 4, 2015 | PERSONS 2+

- Traditional TV
- Using a Game Console
- Using the Internet on a Computer
- Using a DVD/Blu Ray Device
- Using a Multimedia Device
- Using any App/Web on a Smartphone



Hispanics are spending 23% of their media time using Apps or Web on their phones, and tend to spend more time using Video Games (4%) compared to other groups

Asians display the lowest proportion of time with Traditional TV, and the highest percentage of time with Multimedia Devices (4%) and Using Internet on the Computer (21%)

African Americans are spending a higher percentage of their time with Traditional TV compared to other groups

SOURCING & TERMINOLOGY

ACCESSING THE DASHBOARDS USED IN THIS REPORT

All data referenced in this report was pulled from Spotfire Dashboards located on the Media Trends iShare site. To access the library, [click here](#). Use your Enterprise ID and password at the Spotfire log-in screen. If you have questions, please contact the [Media Trends Team](#).

The following dashboards were sourced in this report:

- Device Penetration
- National Monthly TUT
- National Landscape
- Total Audience Dashboard
- TV Service Provider Landscape

EXPLANATION OF TERMS USED IN THIS REPORT:

Smart TVs are defined as capable and enabled; based on HHLD average scaled installed sample

Multimedia Devices as mentioned in this report is the sum of Internet Connected Devices and Audio-Video. Audio-Video includes usage when the following devices are connected to and viewing occurs through the television: Karaoke Machines, Video Camcorders, Security/Digital Cameras. Internet Connected Devices include usage of multimedia devices, such as Apple TV, Roku or Google Chromecast, Smartphones or Tablets through the television.

Using Internet on a computer is derived from Nielsen Netview, and is based on the universe of persons who used the Internet or streamed video on the Internet.

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